

# **ENGINEER'S REPORT**

**Prepared for the**

**CITY OF SAN DIEGO**

**Coral Gate  
Maintenance Assessment District**

**Annual Update Report Fiscal Year 2004**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscape and Lighting Act of 1972  
of the California Streets and Highways Code**

**Prepared by**

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**May 2003**

# **CITY OF SAN DIEGO**

## **Mayor**

Dick Murphy

## **City Council Members**

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District 1

Brian Maienschein  
District 5

Michael Zucchet  
District 2

Donna Frye  
District 6

Toni Atkins  
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Charles Lewis  
District 4

Ralph Inzunza, Jr.  
District 8

## **City Manager**

Michael T. Uberuaga

## **City Attorney**

Casey Gwinn

## **City Clerk**

Charles G. Abdelnour

## **City Engineer**

Frank Belock

## **Assessment Engineer**

Boyle Engineering Corporation

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# Engineer's Report

## Coral Gate

## Maintenance Assessment District

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### Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the CORAL GATE MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2003.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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## Executive Summary

**Project:** Coral Gate  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2003</b>	<b>FY 2004 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	506	506	--
<b>Total Estimated Assessment:</b>	\$57,436	\$86,747	--
<b>Total Number of EBUs:</b>	501.89	501.89	--
<b>Assessment per EBU:</b>	\$114.44	\$172.84	\$172.84

<sup>(1)</sup> FY 2004 is the City's Fiscal Year 2004, which begins July 1, 2003 and ends June 30, 2004. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum Authorized annual amounts subject to cost indexing provisions set forth in this Engineers Report.

**Proposition 218 Compliance:** The District was engineered in Fiscal Year 1999 in compliance with Proposition 218. By a ballot proceeding, majority property owners approved Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing.

**Annual Cost Indexing:** An increase of assessments, under authority of annual cost indexing provisions, is not required for Fiscal Year 2004.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Coral Gate Maintenance Assessment District (District) was established at the request of the property owners under the provisions of the San Diego Maintenance District Procedural Ordinance of 1986. In 1997, the City of San Diego (City) retained Boyle Engineering Corporation (Boyle) and Lintvedt, McColl & Associates (LMA) to prepare an Engineer's Report for the formation of the District

The general purpose of the District is to provide for the maintenance of parkway and slope landscaping along Camino de la Plaza, Sipes Lane and Bibler Drive, fences and walls along Camino de la Plaza, and revegetation and cowbird trapping stations in the open space areas within the District.

The District was engineered in Fiscal Year 1999 in compliance with Proposition 218. By a mail ballot proceeding, property owners approved the District. The Engineer's Report, preliminarily accepted by Resolution Number R-289695 on February 2, 1998, proposed Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing of the maximum authorized assessments.

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## District Proceedings for Fiscal Year 2004

This District is authorized and administered under the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIII D of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Engineer's Report is to update the District budget and assessments for Fiscal Year 2004. The Fiscal Year 2004 assessments proposed within this Engineer's Report do not represent an increase over those assessments previously approved by property owners. Therefore, the requirements of Section 4

of Article XIIID do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

### **Bond Declaration**

No bonds will be issued in connection with this District.

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## **District Boundary**

The Boundary Map & Assessment Diagram for the District are on file in the Maintenance Assessment Districts section of the Park and Recreation Department of the City of San Diego and by reference are made a part of this report. The Boundary Map and Assessment Diagram for the District are available for public inspection during normal business hours. A reduced copy of the Boundary Map is included as Exhibit A hereto.

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## **Project Description**

The project to be funded by the assessments to be levied by the District is the maintenance of parkway and slope landscaping along Camino de la Plaza, Sipes Lane and Bibler Drive, fences and walls along Camino de la Plaza, and revegetation and cowbird trapping stations in the open space areas within the District. The location of the improvements to be maintained are depicted in Exhibit B. The engineering drawings for the landscape improvements (Drawings 26332-47-D through 26332-109-D) are on file at Map Records in the City Engineer's office and are incorporated herein.

Maintenance of parkway and slope landscaping includes, but is not limited to, irrigation, fertilization, weed, trash and litter removal, pruning and replacement of trees and repair of facilities.

The specifications for the maintenance to be performed is contained in Resolution #R-292078 which is incorporated herein by reference and is on file with the City Clerk and the Park and Recreation Department and is available for public inspection during normal business hours.

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## **Separation of General and Special Benefits**

Consistent with City policy for the residential areas at large, the City will provide a minimum of maintenance for streets in this District. The Standard Maintenance provides for street sweeping and litter and trash removal once or twice each year. These cost allocations are considered to be a "general benefit" to the District. The District provides weekly street sweeping and weekly litter and trash removal. The increased costs of operations and administration associated with the enhanced level of maintenance provided by the District exceed the City's contribution to the public at large, and are accordingly considered to be a "special benefit" to the District.

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## **Cost Estimate**

### **Estimated Costs**

Estimated Fiscal Year 2004 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### **Annual Cost Indexing**

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer's report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners in Fiscal Year 1999, allows for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.



The maximum authorized assessment established in the Fiscal Year 1999 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U. Fiscal Year 2000 was the first year authorized for such indexing. However, it has been determined that an increase of assessments, as authorized by the cost indexing provisions, is not required for Fiscal Year 2004.

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## Method of Apportionment

### Estimated Benefit of Improvements

The improvements provided by this District are associated with the maintenance of parkway and slope landscaping along Camino de la Plaza, Sipes Lane and Bibler Drive, fences and walls along Camino de la Plaza, and revegetation and cowbird trapping stations in the open space areas within the District.

Camino de la Plaza, Sipes Lane and Bibler Drive the only arterial streets within the District. They serve as the primary access routes for inter-community and intra-community trips and thus serve all parcels within the community. All parcels benefit from the enhancement of these streets and the enhanced community image provided by the improvements being maintained by this District.

### Apportionment Methodology

The total cost for maintenance of the improvements will be assessed to the various parcels in the District in proportion to the estimated Equivalent Benefit Units (EBUs) assigned to each parcel in relationship to the total EBUs assigned to all the parcels in the District.

EBUs are a function of two factors, a Land Use Factor and a Benefit Factor, related as shown in the following equation.

$\text{EBUs} = \text{Land Use Factor} \times \text{Benefit Factor}$
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Each of these factors are discussed below.

## Land Use Factor

Since the improvements to be maintained or provided by the District are primarily associated with the Transportation Element of the General and Community Plans, trip generation rates for various land use categories (as previously established by the City's Transportation Planning Section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates strictly address only vehicular trips, they are also considered to approximately reflect trip generation for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.) and are considered the best available information for these other transportation modes.

The special benefits of landscape improvements maintained or improved by the District are linked to trip generation primarily by the public safety and aesthetic enhancement enjoyed by travelers through the community. Thus trip generation rates provide the required nexus and basis for assigning ratios of maximum potential benefit to the various land use/zoning classifications as defined by the City's Municipal Code.

Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors. Land Use Factors are summarized as shown in Table 1.

**TABLE 1: Land Use Factors**

Land Use/Zoning	Code	Land Use Factor
Residential – Single Family (detached)	SFD	1.0 per dwelling unit
Educational – Primary & Secondary	EPS	5.0 per acre
Open Space (designated)	OSP	0 per acre
Park – Developed	PKD	5.0 per acre
Street/Roadway	STR	0 per acre

Designated Open Space serves primarily to preserve natural landscape and habitat. While access for study and passive recreation is sometimes permitted, these activities are usually allowed only to the limited extent consistent with the primary purpose of natural preservation. Since this land is essentially “unused” in the customary terms of land use (which relate to human use, not use by nature), the

trip generation rate is zero, therefore, the designated Open Space receives no benefit from the Transportation Element and has been assigned a Land Use Factor of zero.

While those traveling streets and roadways enjoy the improvements maintained or provided by the District during their travel, the actual benefit of this enjoyment accrues to the lands at the origins and destinations of their trips, not to the lands of the streets and roadways, themselves. Accordingly, Streets/Roadways receive no benefit and have been assigned a Land Use Factor of zero.

### **Benefit Factor**

The Land Use Factor described above reflects the relative intensity of use (or potential use) of the various parcels of land to be assessed. It does not address the relationship of this use to the specific improvements to be provided or maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the sub-components of the benefits of District improvements considered may include some or all of the following: public safety, view corridors and aesthetics, enhancement of community identity, drainage corridors, and recreational potential. As Benefit Factors and their sub-components are intended to reflect the particular relationships between specific land uses within a district and the specific improvements maintained or provided by the district, Benefit Factors will generally vary from one district to another, based on the specific details of the applicable land uses and improvements provided.

The applicable benefit sub-components and resultant composite Benefit Factors determined for the various Land Use/Zoning categories within this District are summarized as shown in Table 2.

**TABLE 2: Benefit Factors by Land Use**

<b>Land Use/Zoning</b>	<b>Public Safety (max. 0.2)</b>	<b>Aesthetics (max. 0.8)</b>	<b>Composite Benefit Factor (max. 1.0)</b>
Residential – All	0.2	0.8	1.0
Educational – Primary & Secondary	0.2	0.4	0.6
Open Space (designated)	0.2	0.0	0.2
Park – Developed	0.2	0.0	0.2
Street/Roadway	0.2	0.0	0.2

### ***Public Safety***

All land uses are considered to receive the maximum available benefit from the public safety element of District improvements. Public safety is essential to all land uses, even to lands such as designated Open Space, held in stewardship with only incidental human use.

### ***Aesthetics***

The degree of benefit received from the aesthetic qualities of landscaped roadway medians and rights-of-way maintained or provided by the District varies among land use categories. Generally, by nature of their use, residential lands receive the greatest benefit from the reduced traffic congestion, reduced noise levels, greater separation from traffic and generally more tranquil environment provided by landscaped roadway medians and rights-of-way. Commercial and institutional uses, on the other hand, often thrive on higher densities, greater traffic access, and a higher level of activity in the vicinity of their enterprises. These uses, accordingly, receive a lesser degree of benefit from the general insulation and separation provided by the aesthetic elements of District improvements.

Lands in the Open Space and Street/Roadway categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as enhanced aesthetic quality of other lands in their vicinity does not affect their function, use, or

value. Lands in the Park category are considered to receive no significant benefit from the aesthetic elements of District improvements as the aesthetic values of these lands are themselves so high that they are little enhanced by those of other lands in their vicinity.

### **Equivalent Benefit Units (EBUs)**

The EBUs for each parcel in the district, which resulted from using the EBU formula and various factors described above, are contained in the Assessment Roll (Exhibit C).

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## Summary Results

The District Boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBU's and Fiscal Year 2004 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2004 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

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Eugene F. Shank, PE

C 52792

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Alex Bucher, EIT

CA 112628

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

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Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as SUPERINTENDENT OF STREETS of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram was recorded in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

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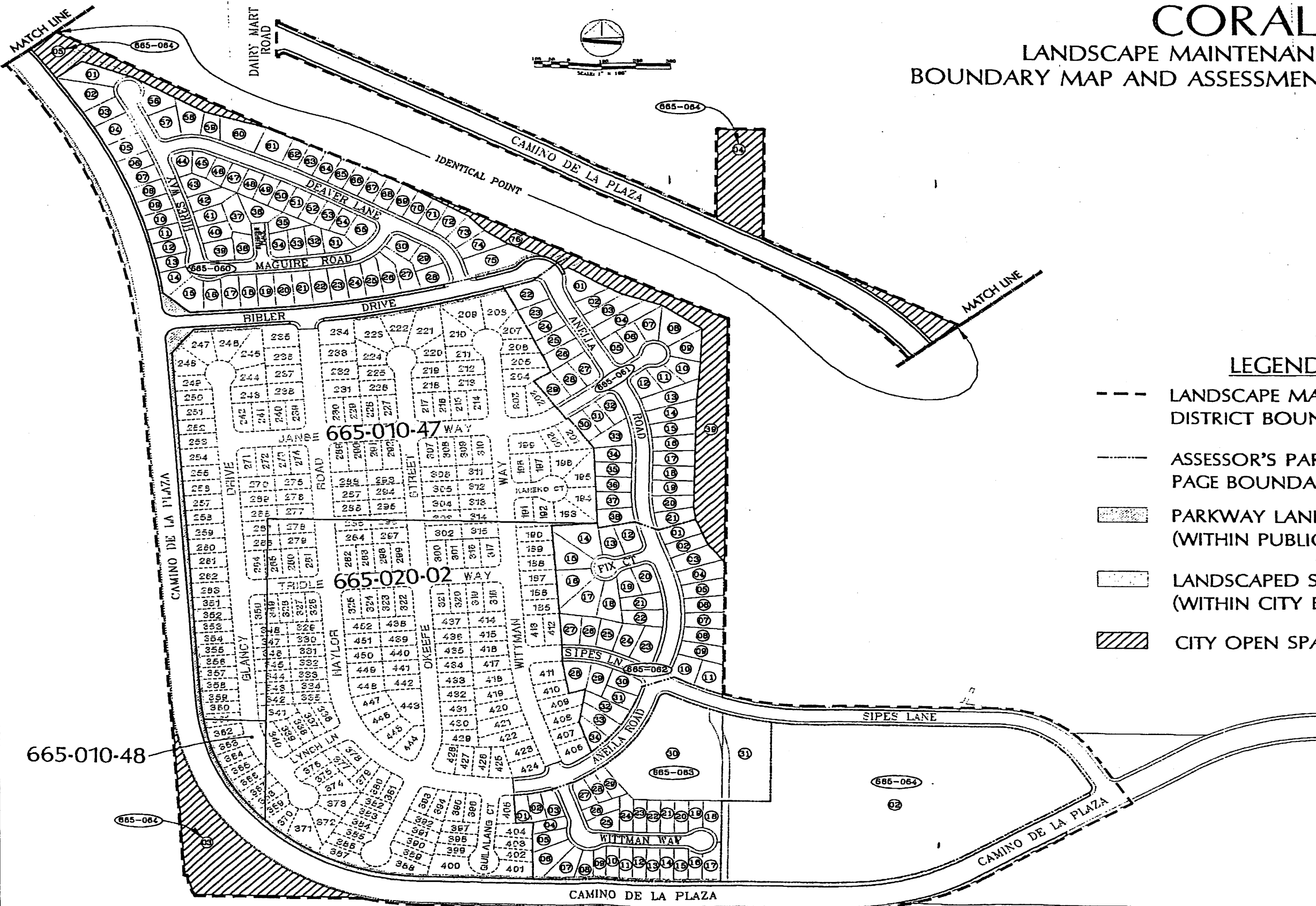
SUPERINTENDENT OF STREETS  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

# **EXHIBIT A**



# CORAL GATE

## LANDSCAPE MAINTENANCE DISTRICT BOUNDARY MAP AND ASSESSMENT DIAGRAM



### LEGEND

- LANDSCAPE MAINTENANCE DISTRICT BOUNDARY
- ASSESSOR'S PARCEL MAP PAGE BOUNDARY
- PARKWAY LANDSCAPE (WITHIN PUBLIC R.O.W.)
- LANDSCAPED SLOPES (WITHIN CITY EASEMENTS)
- CITY OPEN SPACE EASEMENT

# **EXHIBIT B**

# Maintenance Assessment Districts

Council District: 1  
Fund: 70255

Coral Gate

Coral Gate Maintenance Assessment District			
	FY 2002 ACTUAL	FY 2003 BUDGET	FY 2004 PROPOSED
Positions	0.05	0.05	0.25
Personnel Expense	\$ 1,431	\$ 3,756	\$ 18,462
Non-Personnel Expense	20,352	125,346	163,095
<b>TOTAL</b>	<b>\$ 21,783</b>	<b>\$ 129,102</b>	<b>\$ 181,557</b>

The Coral Gate Maintenance Assessment District (District) was established in 1999 to provide maintenance for parkway and slope landscaping along Camino de la Plaza, Sipes Lane and Bibler Drive; fences and walls along Camino de la Plaza; revegetation; and cowbird trapping stations in the open space easement lots within the Coral Gate subdivision.

Per Resolution R-279171 adopted on December 10, 1991, when the Coral Gate subdivision was formed, the development became responsible for the cost of a five-year "Mitigation, Maintenance and Monitoring Plan" in the District open space. A developer provided these services for the first two years (Fiscal Year 2000 and Fiscal Year 2001). The District's budgets for Fiscal Year 2002, Fiscal Year 2003, and Fiscal Year 2004 provide funding for the remaining three years.

The Fiscal Year 2004 Proposed Budget is based on current maintenance costs. The District does not have an established oversight committee.

<b>CORAL GATE</b>	FY 2003 ESTIMATE	FY 2004 PROPOSED
<b>BALANCE</b>	\$ 76,019	\$ 90,980
<b>Revenue</b>		
Assessments	\$ 57,436	\$ 86,747
Interest	2,408	3,642
Environmental Growth Fund <sup>(1)</sup>	-	188
<b>TOTAL OPERATING REVENUE</b>	<b>\$ 59,844</b>	<b>\$ 90,577</b>
<b>TOTAL REVENUE AND BALANCE</b>	<b>\$ 135,863</b>	<b>\$ 181,557</b>
<b>Expense</b>		
Personnel	\$ 3,671	\$ 18,462
Contractual	26,126	43,500
Incidental	7,645	14,191
Utilities	7,441	9,063
Contingency Reserve	-	96,341
<b>TOTAL EXPENSE</b>	<b>\$ 44,883</b>	<b>\$ 181,557</b>
<b>BALANCE</b>	<b>\$ 90,980</b>	<b>\$ -</b>
<b>Assessment per EBU: <sup>(2)</sup></b>	<b>\$ 114.44</b>	<b>\$ 172.84 <sup>(3)</sup></b>

<sup>(1)</sup> In Fiscal Year 2004, the City will contribute general benefit of \$188 from the Environmental Growth Fund for maintenance of 7.05 acres of open space at \$26.63 per acre.

<sup>(2)</sup> The District contains 501.89 Equivalent Benefit Units (EBUs).

<sup>(3)</sup> The maximum allowable assessment is \$172.84 per EBU as set forth in the Assessment Engineer's report. The assessment rate may be increased by a factor published by the San Diego Urban Consumer Price Index (SDCPI-U).

# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.